	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

<b>Description</b>	Appointment PSP Customer & Stakeholder Survey
<b>Advert Date</b>	08 May 2024
<b>Closing Date and Time</b>	<b>13 May 2024 @15h00 p.m.</b>
<b>Compulsory or Non-Compulsory Briefing Session</b>	N/A
<b>SCM Enquiries</b>	<i>Nozipho Sibiyi</i> <b>Tel:</b> 033 341 1324 <b>Email:</b> <a href="mailto:Nozipho.sibiyi@umgeni.co.za">Nozipho.sibiyi@umgeni.co.za</a>
<b>Technical Enquiries</b>	<i>Bathabile Mzoneli</i> <b>Tel:</b> (033) 341-7431 <b>Email:</b> <a href="mailto:bathabile.mzoneli@umgeni.co.za">bathabile.mzoneli@umgeni.co.za</a>
<b>Contents of RFQ</b>	1. Invitation to quote 2. Bidders information 3. Terms and Conditions 4. Undertaking by Bidder 5. Terms of Reference/RFQ specifications 6. Price Schedule 7. Authority to Sign 8. Bidders disclosure [SBD 4] 9. Preference points claim form (SBD 6.1) 10. Contract Form [SBD 7.2]

<b>Quotation Submission:</b>	<b>Tip-Offs Anonymous Hotline:</b>
<b>by email to :</b> <a href="mailto:scmquotes@umgeni.co.za">scmquotes@umgeni.co.za</a> using Q24/634/NS as the email subject	Report unethical conduct at uMngeni-Uthukela Water on: Toll Free Number: 0800 864 463 Email: <a href="mailto:umgeniwater@whistleblowing.co.za">umgeniwater@whistleblowing.co.za</a> Toll Free Fax: 0800 212 689 Postal: Freepost KZN665, Musgrave, 4062 SMS: 33490 Online: <a href="http://www.whistleblowing.co.za">www.whistleblowing.co.za</a>  <i>Stop theft / fraud / dishonesty / bribery /blackmail / intimidation, and remain anonymous.</i>



# REQUEST FOR QUOTATION

RFQ Number: Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

## BIDDERS INFORMATION


Name of Bidder	
Company Registration number	
VAT registration number	
Contact Person	
Telephone number	
Cell number	
E-mail address	
Postal address	
Physical address	
uMngeni-Uthukela Vendor Number	
CSD Supplier number	

**I certify that the information furnished on this form is true and correct. I further accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.**

\_\_\_\_\_  
Name of Representative  
(Duly Authorised)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## TERMS AND CONDITIONS OF REQUEST FOR QUOTATION (RFQ)

1. Any alteration made by the bidder must be initialled.
2. Use of correcting fluid is prohibited
3. Bidders must be registered on the National Treasury's Central Suppliers Database.
4. Tenderers are required to submit a valid Tax clearance verification PIN or CSD MAAA number
5. This quotation is subject to the Preferential Procurement Policy Framework Act and the Preferential Procurement Regulations, 2022; the General Conditions of Contract (GCC) and if applicable any other Special Conditions of Contract.
6. The applicable preference point system for this tender is the 80/20 preference point system, Failure on the part of a tenderer to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed by the bidder. Kindly refer to SBD 6.1 form for additional information.
7. Suppliers must complete the attached SBD 4 – Bidders disclosure, failure to complete these documents may result in the quotation being invalidated.
8. Quotations must be in accordance and comply with the terms of reference/specifications provided, unless otherwise stipulated.
9. The official uMngeni-Uthukela Water quotation form must be used to quote the offered price. Should the allocated price page be insufficient, the tenderer may supplement the price page with an additional pricing breakdown.
10. Price Declaration must be completed, and should the total RFQ prices differ, the one indicated on the price declaration shall be considered the correct price.
11. The successful supplier may be required to fill in and sign a written Contract Form. (If applicable)
12. This document may contain confidential information that is the property of uMngeni-Uthukela Water.
13. No part of the contents may be used, copied, disclosed or conveyed in whole or in part to any party in any manner whatsoever other than for preparing a proposal in response to this RFQ, without prior written permission from uMngeni-Uthukela Water and the Bidder.
14. All Copyright and Intellectual Property herein vests with uMngeni-Uthukela Water and its Bidder.
15. Responses to this RFQ must be submitted by email [scmquotes@umgeni.co.za](mailto:scmquotes@umgeni.co.za) or be deposited in tender box situated as indicated on the quotation request form marked appropriated as directed. (*The applicable submission method is reflected on the cover page*).
16. It is the responsibility of the bidder to ensure that its response reaches uMngeni-Uthukela Water on or before the closing date and time of the RFQ. Late and incomplete submissions will not be accepted.
17. No services must be rendered or goods delivered before an official uMngeni-Uthukela Water Purchase Order form has been received.
18. **uMngeni-Uthukela Water reserves the right to appoint more than one supplier/service provider and or to award the quote as whole or in part.**
19. A full copy of General Conditions of Contract (GCC) are available on the National Treasury website  
(<https://www.treasury.gov.za/divisions/ocpo/sc/generalconditions/general%20conditions%20of%20contract.pdf>)




## REQUEST FOR QUOTATION

RFQ Number: Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

### UNDERTAKING BY BIDDER

1. I/We hereby quote to supply all or any of the supplies and/or to render all or any of the services described in the attached documents to uMngeni-Uthukela Water on the terms and conditions. In accordance with the specifications stipulated in the quotation documents (and which shall be taken as part of and be incorporated into this quote) at the prices and on the terms regarding time for delivery and/or execution inserted therein.
2. I/we agree that:
  - (a) the offer herein shall remain binding upon me and open for acceptance by uMngeni-Uthukela Water during the validity period indicated and calculated from the closing time of the quote;
  - (b) this quote and its acceptance shall be subject to the Public Finance Management Act, 1999, uMngeni-Uthukela Water's Supply Chain Management Policy and Procedures, the General and Special Conditions of Contract as may be applicable, with which I/we am fully acquainted;
  - (c) if I/we withdraw my quote within the period for which I/we have agreed that the quote shall remain open for acceptance, or fail to fulfil the contract when called upon to do so. uMngeni-Uthukela Water may, without prejudice to its other rights, agree to the withdrawal of my quote or cancel the contract that may have been entered into between uMngeni-Uthukela Water and I/us. I/we will then pay to uMngeni-Uthukela Water any additional expenses incurred for having either to accept any less favourable quote or, if fresh quote have to be invited, the additional expenditure incurred by the invitation of fresh quotes and by the subsequent acceptance of any less favourable quotes. uMngeni-Uthukela Water shall reserve the right to recover such additional expenditure by set-off against monies which may be due to me under this, or any other tender or contract or against any guarantee or deposit that may have been furnished by me or on my behalf for the due fulfilment of this or any other tender or contract. Pending the ascertainment of the amount of such additional expenditure to retain such monies, guarantee or deposit as security for any loss uMngeni-Uthukela Water may sustain by reason of my default;
  - (d) if my quote is accepted, the acceptance may be communicated to me by electronic mail, to the email address supplied in my quotation document;
  - (e) the law of the Republic of South Africa shall govern the contract created by the acceptance of my quote and I choose *domicilium citandi et executandi* in the Republic at (full physical address) :  
  
\_\_\_\_\_  
  
\_\_\_\_\_  
  
\_\_\_\_\_
3. I/we furthermore confirm that I/we have satisfied myself as to the correctness and validity of my quote: that the price(s), rate(s) and preference quoted cover all of the work/item(s) and my obligations under a resulting contract, and I accept that any mistakes regarding the price(s) and calculations will be at my risk.
4. I/we hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement, as the Principal(s) liable for the due fulfilment of this contract.


	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
<b>RFQ Number: Q24/634/NS</b>		

5. I/we agree that any action arising from this contract may in all respects be instituted against me and I/we hereby undertake to satisfy fully any sentence or judgement which may be pronounced against me as a result of such action.
6. I/we confirm that I/we have declared all and any interest that I or any persons related to my business has with regard to this quote or any related quotations by completion of the Declaration of Interest Section.
7. **I/WE, THE UNDERSIGNED, WHO WARRANT THAT I AM DULY AUTHORISED TO DO SO ON BEHALF OF THE TENDERER, CERTIFY THAT THE INFORMATION SUPPLIED IN TERMS OF THIS DOCUMENT IS CORRECT AND TRUE, THAT THE SIGNATORY TO THIS DOCUMENT IS DULY AUTHORISED AND ACKNOWLEDGE THAT:**
- (1) The tenderer will furnish documentary proof regarding any tendering issue to the satisfaction of the uMngeni-Uthukela Water, if requested to do so.
- (2) If the information supplied is found to be incorrect and/or false then uMngeni-Uthukela Water, in addition to any remedies it may have, may: -
- a) Recover from the contractor all costs, losses or damages incurred or sustained by UMngeni-Uthukela Water as a result of the award of the contract, and/or
  - b) Cancel the contract and claim any damages which uMngeni-Uthukela Water may suffer by having to make less favourable arrangements after such cancellation.

\_\_\_\_\_  
Name of Representative  
(Duly Authorised)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## SCOPE OF WORKS

### APPOINTMENT OF SERVICE PROVIDER TO CONDUCT A STAKEHOLDER SATISFACTION SURVEY

**DEADLINE DATE : 15 MAY 2024**

**NB: Different milestones and phases of this survey spread over the new financial Year: July 2024 – July 2025 that the appointed service will have to meet.**

These milestones and phases are contained in the Stakeholder Satisfaction Survey Implementation plan attached.

#### THE SCOPE OF WORK IS AS FOLLOWS:

##### A. STAKEHOLDER SATISFACTION SURVEY:

- This survey must be done among uMngeni-uThukela Water (UUW) 4 (four) categories of Stakeholders - i.e. Statutory, Strategic, Contracted and Non-Contracted.
- The survey must test the Stakeholder's attitudes towards and perception of uMngeni-uThukela Water, together with their level of satisfaction with UUW. It must also identify areas where UUW should/ must improve. It must also identify opportunities for collaboration and partnerships, specifically in the areas of training and development (enterprise and supplier development) and corporate social responsibility.
- 2
- Stakeholders must also be asked what support can be provided by uMngeni-uThukela Water to enhance and improve their service delivery.
- Emerging and Potential new Stakeholder must also be interviewed after a quick environmental scan is conducted. The survey must be based on:
  - (a) What assistance can UUW provide to improve or enhance the stakeholders aspirations and skills
  - (b) Does stakeholders know of uMngeni-uThukela Water Water and what is their opinions
  - (c) What will it take stakeholders to become UUW Stakeholders in order to assist in improving service delivery and infrastructure implementation?

##### B. REQUIREMENTS OF THE APPOINTED SERVICE PROVIDER:

1. Engagement with the Corporate Stakeholder Management Unit for a briefing of the survey
2. Meeting with the Senior Managers, Representatives of NEHAWU and SAMWU and non-unionised staff for exchange of ideas on focused questions pertinent to the survey.
3. Development of draft questionnaire.
4. Presentation of draft questionnaire to CSMU Manager.
5. CSMU Manager will present the draft questionnaire to EXCO for input.
6. Finalisation of the questionnaire.

7. The survey must then be rolled out
  - The service provider must decide on format of survey – i.e. written questions, telephonic interview or focus groups.
8. Development of a Draft Report on outcome of survey.
9. Presentation of Draft report of CSMU Manager, Senior Managers, Representatives of NEHAWU and SAMWU and non-unionises staff.
10. Finalisation of the survey outcomes report.
11. Presentation of survey to EXCO.
12. CSMU Manager will make a submission to Audit Committee on survey outcomes report.
13. Service Provider must present survey outcomes report to the Board.

**C. STAKEHOLDER AND NUMBER OF RESPONDENTS IN SURVEY**

STATUTORY	
Stakeholder	Number of respondents in Survey
Minister of Water and Sanitation including a Deputy Minister	2
Department of Water and Sanitation	2
National Assembly - Portfolio Committee on Water and Sanitation	2
Ministry of Finance	2
Department of Labour	2
National Treasury	2
Office of the Auditor-General	2

STRATEGIC	
Stakeholder	Number of respondents in Survey
KZN Office of the Premier	2
MEC for Economic Development, Tourism and Environmental Affairs	2
MEC for Provincial Treasury	2
Ingonyama Trust Board (ITB)	2
South African Local Government Association (SALGA)	2
Trans-Caledon Tunnel Authority (TCTA)	2
Water Research Commission ( WRC)	2
Water Institute of Southern Africa (WISA)	2
Institute of Municipal Engineering of Southern Africa (IMESA)	2
KZN COGTA	2
KZN Planning Commission:	2
South African Association of Water Utilities	2
<b>Three Strategic Suppliers :</b> ESKOM,	3 x 2 = 6



# REQUEST FOR QUOTATION

RFQ Number: Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

DWS and  
Chemical Supplier


## CONTRACTED

Stakeholder	Number of respondents in Survey:
uMngeni-uThukela Water Water Board	3
Non-unionised Staff	3
NEHAWU	3
SAMWU	3
DWS	2
Investors and Bond Holders	4 x 2 =8

## NON-CONTRACTED

Stakeholder	Number of respondents in Survey
Media Houses	4
KZN Provincial House of Traditional Leadership (KZNPHTL)	
District Local Houses of Traditional Leaders in the 7 Districts Municipalities where uMngeni-uThukela Water Water is a Water Service Provider :	7 x 2 = 14
<b>Chambers of Business</b> Durban, Pietermaritzburg, UGU – South Coast, Zululand	4 x 2 = 8
<b>INSTITUTIONS OF HIGHER LEARNING :</b> Mangosuthu University of Technology(MUT) University of KwaZulu Natal (UKZN) Durban University of Technology(DUT) Wits	4 x 2 =8



	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A CUSTOMER SATISFACTION SURVEY

**DEADLINE DATE : 15 MAY 2024**

### CUSTOMER SATISFACTION

**NB: Different milestones and phases of this survey spread over in the financial Year: July 2024 – July 2025 that the appointed service will have to meet.**

**These milestones and phases are contained in the Stakeholder Satisfaction Survey Implementation plan, attached.**

#### **A. THE SCOPE OF WORK IS AS FOLLOWS:**

##### CUSTOMER SATISFACTION SURVEY

- This survey must be done among uMngeni-uThukela Water Water's seven (7) Municipal Customers. The survey must test customers's attitudes towards and perceptions of uMngeni-Water, together with their level of satisfaction with UUW.
  - Customers must also be asked what new products and services they require and which can be developed by UUW is support of them to improve service delivery
- Potential Customers (Other Water Services Authorities) must also be interviewed to ascertain:
- (a) What products and services they require and which can be developed by UUW to assist in improving service delivery.
  - (b) Do they know/ know of UW and what is their opinion and attitude towards UUW
  - (c) What will it take for them to become customers of UUW

#### **B. REQUIREMENTS OF THE APPOINTED SERVICE PROVIDER:**


1. Engagement with the Corporate Stakeholder Management Unit for a briefing of the survey
2. Meeting with the Senior Managers, Representatives of NEHAWU and SAMWU and non-unionised staff for exchange of ideas on focused questions pertinent to the survey.
3. Development of draft questionnaire.
4. Presentation of draft questionnaire to CSMU Manager.
5. CSMU Manager will present the draft questionnaire to EXCO for input.
6. Finalisation of the questionnaire.
7. The survey must then be rolled out
  - The service provider must decide on format of survey – i.e. written questions, telephonic interview or focus groups.
8. Development of a Draft Report on outcome of survey.
9. Presentation of Draft report of CSMU Manager, Senior Managers, Representatives of NEHAWU and SAMWU and non-unionised staff.

10. Finalisation of the survey outcomes report.
11. Presentation of survey to EXCO.
12. CSMU Manager will make a submission to Audit Committee on survey outcomes report.
13. Service Provider must present survey outcomes report to the Board.

### **C. CUSTOMER AND NUMBER OF RESPONDENTS IN SURVEY**

STATUTORY	
CUSTOMER	Number of respondents
eThekwini Metro 1 x Political Head - Mayor 3 x Technical and Admin - Municipal Manager - Head of Water and Sanitation - Deputy Head of Water and Sanitation	4
Msunduzi Local Municipality (respondents be structured as outlined with eThekwini Metro)	4
uMgungundlovu Local Municipality (respondents be structured as outlined with eThekwini Metro)	4
iLembe District Municipality (respondents be structured as outlined with eThekwini Metro)	4
Harry Gwala District Municipality (respondents be structured as outlined with eThekwini Metro)	4
UGU District Municipality (respondents be structured as outlined with eThekwini Metro)	4
King Cetshwayo District Municipality (respondents be structured as outlined with eThekwini Metro)	4

POTENTIAL CUSTOMERS OTHER WATER SERVICES AUTHORITIES THAT MUST BE INTERVIEWED	
CUSTOMER	Number of respondents
uThukela District Municipality 1 x Political Head - Mayor 3 x Technical and Admin - Municipal Manager - Head of Water and Sanitation - Deputy Head of Water and Sanitation	4
Amajuba District Municipality	4
Newcastle Local Municipality	4
uMzinyathi District Municipality	4
uMkhayakude District Municipality	2
Zululand District Municipality	2
City of uMhlathuze District Municipality	2
Abaqulusi Local Municipality	

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## 1. Pricing

- a) The bidder shall provide the price proposal as detailed in SBD 3.1
- b) The bidders's price must be fully inclusive, and each item must be clearly specified.
- c) All additional costs must be clearly specified and included in the total quotation price, (e.g. transport, labour, etc.).
- d) All prices must be VAT inclusive.
- e) The bidder is responsible for all the cost that they shall incur related to the preparation and submission of the quotation.

## 2. Evaluation Process

The RFQ will be evaluated using a three (03) stage evaluation approach:

### 2.1 First stage: Administrative Requirements

1. Bidder completed all RFQ Forms
  2. Bidder registered on National Treasury CSD
- Mandatory Requirement**
3. SBD 4 – Bidders disclosure

### 2.2 Second Stage: Price and Preference goals

1. Subsequent to the evaluation of mandatory/ administrative requirements, the second stage of evaluation of the bids will be in respect of price and preferential procurement only.
2. Tenderer is tax complaint
3. In compliance with the Preferential Procurement Regulations 2022, the 80/20 preference point system is applicable: points for this bid shall be awarded for:
  - a) Price; and (80) and Preference as defined in SBD 6.1 (20)
4. The Preference Goals that have been identified for this bid is stipulated in SBD 6.1
5. Preferential goals and applicable points for this tender in terms of Preferential Procurement Regulations 2022, are indicated in the table below:

	Description	80/20	Evidence to be provided
HDI	<b>At least 51% black owned entity</b>	20	Valid BBBEE certificate/Sworn affidavit
<b>Total points for preferential goals</b>		<b>20</b>	

6. Failure on the part of a bidder to submit proof or documentation required in terms of this RFQ to claim points for specific goals, will be interpreted to mean that preference points for specific goals are not claimed by the bidder.
7. UW reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by UW.
8. UW reserves the right to conduct negotiations with the qualifying bidder/s regarding any terms and conditions, including price(s), of a proposed contract where applicable UW reserves the right not to accept the lowest financial offer or any offer.

### 2.3 Third Stage: Functionality Evaluation

The purpose of application of qualification criteria is to determine the functionality of each proposal by assessing the quality thereof. Below is a detailed breakdown of the scoring criteria

Bidders from the second stage who have achieved 70 points or more will be eligible to submit to be evaluated on Price and Specific Goals

#### Returnable Schedule Weighting %

Company Experience in survey services	50
Experience of Project Team	40
Method Statement	10

#### Tenderer's Experience

The experience of the Tenderer will be evaluated on the basis of experience in similar projects or similar areas and conditions in relation to the scope of work. The completed projects that will be considered for evaluation should have been undertaken in the past ten years. **Tenderers should include signed completion or reference letters of the past projects that have components of the scope of work for this tender.** Tenderers should describe his or her experience in this regard relevant to the scope of work and attach this to this schedule.

#### Survey services from previous clients:

Project name	Project brief description	Period/Year	Value of work inclusive of VAT (Rand)	Company (where the project was done)	Contact Details

# REQUEST FOR QUOTATION

RFQ Number: Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

Scoring of the Tenderer's Company experience will be as follows: **50**

DESCRIPTION	MAX POSSIBLE SCORE
<p><b>Past relevant experience of the organization:</b></p> <p>Company's experience in conducting Customer Surveys. Bidders must attach <b>copies of reference letters</b> for the past 3 years from clients as proof. The reference letters must be in a legitimate letterhead.</p> <p>Points Scoring for Past relevant Experience of the organization:</p> <ul style="list-style-type: none"> <li>• 1 project – 25 points</li> <li>• 2 projects – 30 points</li> <li>• 3 projects – 35 points</li> </ul> <p>10 additional points for more than three (03) projects to a maximum of 50 points</p> <p>Company's experience in conducting Stakeholder Surveys. Bidders must attach <b>copies of reference letters</b> for the past 3 years from clients as proof. The reference letters must be in a legitimate letterhead.</p> <p>Points Scoring for Past relevant Experience of the organization:</p> <ul style="list-style-type: none"> <li>• 1 project – 25 points</li> <li>• 2 projects – 30 points</li> <li>• 3 projects – 35 points</li> </ul> <p>10 additional points for more than three (03) projects to a maximum of 50 points</p> <p><b><i>Should the reference letters fail to have the indicated aspects and the information above not be verifiable, bidders will score zero points. Appointment letters, Purchase Orders and Testimonials are not acceptable. Only reference letters will be considered. References should not be older than 3 years. A list of references will not be considered for evaluation and points scoring</i></b></p>	<p><b>100</b></p>



## REQUEST FOR QUOTATION

**RFQ Number:** Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

### Project Team

Relevant experience of the project team – Tenderers to list projects where **survey services** were performed. **Bidders are required to submit CV's of the project team, detailing their qualifications and experience.**

The **Project team** must as a minimum have a **Bachelor's Degree in Statistics, Market Research, Social Sciences or related.**

Provide relevant information (CV's) as prescribed below

A CV (**not more than 3 pages**), shall be provided and a copy of the relevant qualification. Certificates.

The scoring of the experience of the **personnel experience** shall be as follows: [40]


**Bidders are required to submit CV's of the project team, detailing their qualifications and experience. The CVs must be submitted with qualifications and relevant experience.**

**Experience of personnel experience in survey services:**

- 1 CV with a minimum of 3 years related experience, relevant qualification/s – 10 points.
- 2 CVs with a minimum of 3 years related experience, relevant qualification/s- 30 points.
- 3 CVs with a minimum of 3 years related experience, relevant qualification/s– 70 points.

-10 additional points for more than 3 CVs with more than three years related experience with relevant qualification/s to a maximum of 100 points ]

[100 ]

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

**Method Statement (10)**

The method statement must respond to the Scope of Work and outline the proposed approach / methodology. The method statement should articulate what value the Tenderer will add by in achieving the stated objectives for the project.

The Tenderer must as such explain his / her understanding of the objectives of the assignment and the Employer’s stated and implied requirements, highlight the issues of importance, and explain the technical approach they would adopt to address them. The approach paper should explain the methodologies which are to be adopted, demonstrate the compatibility of those methodologies with the proposed approach. The approach should also include a quality plan which outlines processes, procedures and associated resources, applied by whom and when, to meet the requirements and indicate how risks will be managed and what contribution can be made regarding value management.


The Tenderer must attach his / her approach paper to this page. **The approach paper should not be longer than 8 pages.**

The methodology should at the very minimum include the following:

- General Approach to survey services. The detailed proposal must show software used to be able to claim points in this section.
- Bidders are required to present a company profile

Scoring of the Method Statement will be as follows: **10**

Technical approach and methodology	
<b>No submission (score 0)</b>	No Method Statement submitted
<b>Poor (score 40)</b>	The technical approach and / or methodology is poor / is unlikely to satisfy project objectives or requirements. The Tenderer has misunderstood certain aspects of the scope of work and does not deal with the critical aspects of the project.
<b>Satisfactory (score 70)</b>	The approach is generic and does not cover requirements but tailored to address the general project objectives and methodology. The approach does not deal with the critical characteristics of the project. The quality plan, manner in which risk is to be managed is very generic.
<b>Good (score 80)</b>	The approach is specifically tailored to address the specific project objectives with reference to requirement and methodology and is sufficiently flexible to accommodate changes that may occur during execution. The quality plan and approach to managing risk is specifically tailored to the critical characteristics of the project.
<b>Very good (score 100)</b>	Besides meeting the “good” rating, the important issues are approached in an innovative and efficient way, indicating that the Tenderer has outstanding knowledge of state-of-the- art approaches. The approach paper details ways to improve the project outcomes and the quality of the outputs.

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	RFQ Number: Q24/634/NS	

**PRICING SCHEDULE – FIRM PRICES (PURCHASES)**

**NOTE:**

- a) Only firm prices will be accepted. Non-Firm prices (including prices subject to rates of exchange variations) will not be considered
- b) In cases where different delivery points influence the pricing, a separate pricing schedule must be submitted for each delivery point

Name of bidder _____	RFQ number Q24/634/NS
Closing Time 15h00 p.m.	Closing date <b>13 May 2024</b>

OFFER TO BE VALID FOR \_\_\_\_\_ CALENDER DAYS FROM THE CLOSING DATE OF QUOTE.

Item no.	QUANTIY	DESCRIPTION	UNIT PRICE	TOTAL
1.	1	CUSTOMER SATISFACTION SURVEY AS SPECIFIED		
2.	1	STAKEHOLDER SATISFACTION SURVEY AS SPECIFIED		
<b>SUB TOTAL</b>				
<b>VAT @ 15%</b>				
<b>GRAND TOTAL (price SA Rands with all applicable taxes included)</b>				

I (full name) \_\_\_\_\_, in my capacity as \_\_\_\_\_, the duly authorized representative of \_\_\_\_\_ (business name) hereby declares that the offer is in accordance with the attached specification, notes to suppliers & accepts all conditions/clauses contained in the said documents.

Signature of duly authorized representative _____	DATE: _____
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# REQUEST FOR QUOTATION

RFQ Number: Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

## AUTHORITY TO SIGN

RFQ NO: Q24/634/NS

Description: \_\_\_\_\_

Close Corporation / Company / Partnership / Trust /Sole proprietor or Sole trader

Company Name: \_\_\_\_\_

Registration Number: \_\_\_\_\_


Resolution Of The Directors Of The Company etc. resolved that \_\_\_\_\_, in his/her capacity as \_\_\_\_\_, is authorized to make applications on behalf of the Close Corporation / Company / Partnership / Trust /Sole proprietor or sole trader for:

Any documentation relating to the business (which is not necessarily a change of ownership). The nominated person will also have access to webpage for the business. Signature(s) for Close Corporation / Company / Partnership / Trust/ Sole proprietor or sole trader.

(Sole member still must sign this resolution)

Signature of members:

Name	Signature	Date
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## SBD 4 - BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise, employed by the state **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**


2.2.1 If so, furnish particulars:

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<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

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**3 DECLARATION**

I, the undersigned, (name) \_\_\_\_\_ in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.


I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Position

\_\_\_\_\_  
Name of bidder

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 (SBD 6.1)

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

### 1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:  
the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and  
the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

#### 1.2 To be completed by the organ of state

The applicable preference point system for this tender is the **80/20** preference point system.

- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
- (a) Price; and
  - (b) Specific Goals.

#### 1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
<b>PRICE</b>	80
<b>SPECIFIC GOALS</b>	20
<b>TOTAL POINTS FOR PRICE AND SPECIFIC GOALS</b>	<b>100</b>

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state

## 2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) & \mathbf{or} & P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)
 \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT


#### 3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right) & \mathbf{or} & P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)
 \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmax = Price of highest acceptable tender

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**  
*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.*

**Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)**

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)  (To be completed by the organ of state)	Number of points claimed (80/20 system)  (To be completed by the tenderer)
<b>At least 51% black owned entity</b>	20	

#### DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm \_\_\_\_\_

4.4. Company registration number: .....

TYPE OF COMPANY/ FIRM [TICK APPLICABLE BOX]

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company



# REQUEST FOR QUOTATION

RFQ Number: Q24/634/NS

Form No: UW-RFQ-2  
Version No: 3/2023  
Effective Date: Jul 2023

- 4.5. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/firm for the preference(s) shown and I acknowledge that:
- i) The information furnished is true and correct;
  - ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
  - iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
  - iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
    - (a) disqualify the person from the tendering process;
    - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
    - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
    - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
    - (e) forward the matter for criminal prosecution, if deemed necessary.

**SIGNATURE(S) OF TENDERER(S)** \_\_\_\_\_

**SURNAME AND NAME:** \_\_\_\_\_

**DATE:** \_\_\_\_\_


**ADDRESS:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	<b>RFQ Number: Q24/634/NS</b>	

## SBD 7.1 CONTRACT FORM - PURCHASE OF GOODS/WORKS

**This form must be filled in duplicate by both the successful bidder (part 1) and the purchaser (part 2). Both forms must be signed in the original so that the successful bidder and the purchaser would be in possession of originally signed contracts for their respective records.**

### PART 1 (TO BE FILLED IN BY THE BIDDER)

1. I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to uMngeni-Uthukela Water in accordance with the requirements and specifications stipulated in the above mentioned RFQ number at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (i) Bidding documents, viz
    - Invitation to bid;
    - Proof of tax compliance status;
    - Pricing schedule(s);
    - Technical Specification(s);
    - Preference claim form for Preferential Procurement in terms of the Preferential Procurement Regulations;
    - Bidder's Disclosure form;
    - Special Conditions of Contract;
  - (ii) General Conditions of Contract; and
  - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorised to sign this contract.

NAME (PRINT) \_\_\_\_\_


CAPACITY \_\_\_\_\_

SIGNATURE \_\_\_\_\_

NAME OF TENDERER \_\_\_\_\_

DATE \_\_\_\_\_

<b>WITNESSES</b>	
1	_____
2.	_____
DATE:	_____

	<b>REQUEST FOR QUOTATION</b>	Form No: UW-RFQ-2 Version No: 3/2023 Effective Date: Jul 2023
	RFQ Number: Q24/634/NS	

**SBD 7.1 CONTRACT FORM - PURCHASE OF GOODS/WORKS**

**PART 2 (TO BE FILLED IN BY THE PURCHASER)**

1. I \_\_\_\_\_ in my capacity as \_\_\_\_\_ accept your quotation under reference number \_\_\_\_\_ dated \_\_\_\_\_ for the supply of goods/works indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating delivery instructions is forthcoming.
3. I undertake to make payment for the goods/works delivered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice accompanied by the delivery note.

<b>ITEM NO.</b>	
<b>PRICE (ALL APPLICABLE TAXES INCLUDED)</b>	
<b>BRAND</b>	
<b>DELIVERY PERIOD</b>	
<b>TOTAL PREFERENCE POINTS CLAIMED</b>	
<b>POINTS CLAIMED FOR SPECIFIC GOAL 1- At least 51% black owned entity</b>	

4. I confirm that I am duly authorised to sign this contract.

SIGNED AT \_\_\_\_\_ ON: \_\_\_\_\_

NAME (PRINT): \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

OFFICIAL STAMP

WITNESSES

1. \_\_\_\_\_

2. \_\_\_\_\_

DATE: \_\_\_\_\_